

April 23, 2007

BEFORE THE PUBLIC UTILITIES COMMISSION OF THE STATE OF CALIFORNIA

Order Instituting Rulemaking Into

Implementation of Federal Communications

Commission Report and Order 04-87, As It

Affects The Universal Lifeline Telephone Service

Program.

R. 04-12-001

R. 04-12-001

OPENING COMMENTS OF SUREWEST TELEPHONE (U 1015 C) AND SUREWEST TELEVIDEO (U 6324 C)

ON

PROPOSED DECISION OF ALJ JONES ADOPTING STRATEGIES TO IMPROVE THE CALIFORNIA LIFELINE CERTIFICATION AND VERIFICATION PROCESSES, AND REINSTATING PORTIONS OF GENERAL ORDER 153

E. Garth Black
Mark P. Schreiber
Sean P. Beatty
Patrick M. Rosvall
COOPER, WHITE & COOPER LLP
201 California Street – 17<sup>th</sup> Floor
San Francisco, CA 94111
Telephone: (415) 433-1900
Telecopier: (415) 433-5530

Attorneys for SureWest TelePhone and SureWest TeleVideo

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### I. INTRODUCTION.

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Pursuant to Rule 14.3 of the California Public Utilities Commission's ("Commission")
Rules of Practice and Procedure, SureWest Telephone (U 1015 C) and SureWest TeleVideo (U 6324 C) ("SureWest") hereby submit their opening comments on the Proposed Decision Of ALJ Jones Adopting Strategies To Improve The California LifeLine Certification And Verification Processes, And Reinstating Portions Of General Order 153 ("Proposed Decision"). SureWest appreciates the Commission's efforts to improve the operation of the LifeLine certification and verification process, and to rectify the problems that have arisen since the third-party certifying agent (currently "Solix") assumed responsibility for confirming customer eligibility.

With some revisions, the Proposed Decision will embody a strong set of short-term solutions, many of which would help ameliorate the difficulties that customers and carriers have faced under the new system. First, the Commission should not adopt a requirement that carriers provide "reminder notices" to customers who have signed up for LifeLine service. This carrier involvement in the certification process is unnecessary and inconsistent with the Commission's prior determinations that it would rely on a third party to perform certification-related functions. If "reminder notices" are required, they should only be mandated for a six-month period as a temporary measure while the Commission pursues long-term program changes. Second, the Commission should require that Solix give carriers at least three business days' advance notice of any system or program changes, and that any changes be implemented during non-business hours Pacific Time. Third, the Proposed Decision should clearly state that any recommendations from the Lifeline implementation and marketing "working groups" must be formalized in a Commission Resolution or Decision before they become policy. Fourth, the Proposed Decision should provide additional guidance to carriers and customers regarding the types of questions about the program that should be answered by carriers, the certifying agent, and the Commission. With these changes, SureWest would support the Proposed Decision.

While the Commission pursues these short-term, incremental "fixes" to the program, it should not lose sight of the need for long-term reform. Most importantly, it is absolutely critical

1 to the success of the program that the Commission require the certifying agent to send certification 2 3 4 5 6 7 8 9 10 11 12 13

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and verification materials to customers using first-class mail. Based on SureWest's experiences under the new LifeLine certification program, the most significant cause of the low response rate and customer complaints is the fact that customers are not receiving certification documents in a timely manner. Moreover, to create the proper incentives for customers to complete the certification process, and to avoid the need to back-bill denied customers for multiple months of service, the Commission should provide that LifeLine discounts will only be given after a customer's eligibility has been confirmed. The Commission should also make it easier for customers to obtain certification documents by making those documents available on the internet, through community-based organizations, and through other public sources. Further, the Commission should actively pursue the adoption of a web-based certification alternative. While some of these more holistic program changes will take time to effectuate, SureWest believes that these are the most direct and complete ways to repair the ULTS certification and verification processes.

### II. WITH SOME REVISIONS, SUREWEST SUPPORTS THE COMMISSION'S SHORT-TERM APPROACH TO IMPROVING THE ULTS PROGRAM.

In general, the Proposed Decision presents a well-considered approach to addressing some difficult problems within a short timeframe. This is particularly admirable given the constraints of the state contracting process and the difficulty of adopting more long-term fixes. Nevertheless, there are aspects of the Proposed Decision that should be modified to avoid hardship to customers and difficulties for carriers. The Proposed Decision also requires clarification in several respects. SureWest proposes that the Proposed Decision be revised as set forth below.

### A. The Proposed Decision Should Not Adopt a Permanent Requirement that Carriers Provide "Reminder Notices" to LifeLine Customers.

The Proposed Decision would impose an ongoing requirement on carriers that "reminder notices" be provided to all new enrollees in the LifeLine program. Proposed Decision, at p. 16.

This additional regulatory requirement is unnecessary in light of the sources of the certification problems, and inconsistent with the Commission's established policy of relying on a third-party certifying agent as the focal point of the certification process. As discussed in further detail below, the low response rates and customer complaints have been caused largely by the untimely mailing of certification documents, and by the issuance of LifeLine discounts prior to completion of the certification process. Compared to these issues, SureWest does not believe that customer confusion about Solix's role in the certification process has been a significant contributing factor to the problems with the LifeLine program. The Commission should devote its resources to addressing the major problems with the program rather than imposing a new regulatory requirement on carriers that will not squarely address those problems, and the costs of which will ultimately be borne by the ULTS fund. These costs would be better spent on first-class mailings of certification forms, as discussed below. The Staff Report does not include sufficient evidence of a problem that would justify this requirement.

Having made the choice to rely on a third-party certifying agent as the central point of contact for the certification process, the Commission should not now deviate from that decision by roping carriers back into the process. The Staff Report finds that prospective LifeLine customers should be given additional "touches" in order to inform them about the process, but there is no reason why those additional "touches" could not come from the certifying agent. As part of the LifeLine enrollment process, carriers already provide all of the necessary information about the certification process, including information about the mailing of the certification forms, and the fact that those forms must be returned to the third-party administrator. *See* G.O. 153 § 4.2.1.2.2. The "script" in General Order 153 should be sufficient to convey the message to customers that a third-party entity is facilitating the certification process. The proposed new Section 4.1.3 of General Order 153 and the associated "reminder notice" contain information that is entirely

COOPER, WHITE
& COOPER LLP
ATTORNEYS AT LAW
201 CALIFORNIA STREET
SAN FRANCISCO, CA 94111

**5** 

duplicative of what is already in Section 4.2.1.2.2. The proposed Section 4.1.3 should not be adopted.

If, notwithstanding the arguments above, the Commission elects to adopt a "reminder notice" requirement for LifeLine customers, that requirement should not be adopted on a permanent basis. Rather than modifying General Order 153, the Commission could adopt this requirement as an interim measure for a period of six months. This would allow the Commission sufficient time to resolve some of the long-term issues with the LifeLine program, including the untimely mailing issue. If Solix mails the certification forms via first-class mail, they will arrive within approximately three days, and there would be no need for carriers to provide a notice reminding the customer that the forms are coming. Even if there were a justification for this requirement, that justification would certainly disappear when the mailing issue is corrected.

B. The Commission Should Establish Stricter Procedures Governing Solix-Initiated Changes to the Verification Process, the Certification Process, the File Transfer Protocol System, or the Web-Based System.

The Commission should implement a formalized procedure for the certifying agent to notify carriers of any changes to the certifying agent's systems or its data processing protocols. If carriers are not informed of these modifications in the system, confusion, disruption, and/or erroneous processing of data may occur. Since the problems with the certification and verification processes were brought to light, Solix has been called upon to make necessary changes to its systems. In some instances, carriers have not been properly informed of the changes, resulting in significant confusion. For example, on or around March 20, 2007, Solix modified its protocol for generating the "effective date" field in its return data feeds to carriers. Prior to that date, SureWest understands that Solix had been using the LifeLine "start date" as the "effective date." Without informing carriers of the change, Solix unilaterally modified the "effective date" field to reflect the "date on which Solix processed the customer's information." Solix had a valid reason for making

this change, but it did not inform carriers in a timely manner that the change had been made. Since some carriers had been generating their LifeLine claim information from the "effective date" field in Solix's return feeds, the change in the meaning of that field had a significant impact on the accuracy of those carriers' claims. Had carriers been informed in advance of the impending system modification, there would have been time for carriers to alter their systems to draw claim information from a source other than Solix's "effective date" field.

To prevent this type of situation from arising in the future, the Proposed Decision should include a directive that the certifying agent must maintain a list of carrier contacts, and provide at least three business days' advance notice via email of any changes to the Solix system or processing protocols. The collection of contact information can be facilitated through the implementation "working group" at the direction of Commission staff. SureWest also supports the requirement in the Proposed Decision that Solix must report any system "glitches" to the Commission within 48 hours of when they are discovered. *Proposed Decision*, at pp. 18-19. Carrier contacts should also be informed of any problems through a similar mechanism. The certifying agent should be required to include carriers on any correspondence to the Commission that identifies "glitches." Solix should also be instructed to follow through with individual carrier "fixes" in a prompt manner.

There are other steps that should be taken to prevent problems from arising in connection with systems changes initiated by the certifying agent. Any changes to the system should occur at non-business hours in the Pacific Time Zone. Probably because Solix is based in New Jersey, there have been instances where system changes have been made in the middle of the day on the West Coast. The certifying agent should manage its system modifications so that the database does not change while carriers are actively utilizing it during normal business hours.

C. Recommendations from the "Working Groups" Should be Formalized in Commission Resolutions in Phase II of this Proceeding Before they Become Commission Policy.

To ensure that all interested parties have notice and an opportunity to be heard regarding any proposed changes to the LifeLine program, the recommendations of the working groups should not become Commission policy until they are adopted in a Commission Resolution.

SureWest appreciates the Commission's creation of the working groups. The groups have been an effective way to open the channels of communication between Solix, the Commission, and carriers regarding LifeLine issues. SureWest also appreciates the need to allow the working groups to function without micro-management from the Commission. However, the working groups have been the genesis of a number of significant changes to the LifeLine certification and verification processes. While many carriers and other interested parties participate on the working group calls, the participation is far from universal. In light of this fact, and in keeping with proper administrative processes, the working groups should be considered advisory bodies, not decision-making bodies.

The working groups should make recommendations that can be presented and evaluated through the Commission's typical administrative policymaking procedures. SureWest supports the Commission's directive that staff be allowed to "make further amendments to the G.O. via the resolution process as long-term solutions to the mailing and other issues are identified and changes to the G.O. warranted." *Proposed Decision*, at p. 9. Either a Resolution or a full Commission Decision should be necessary to implement any new policy recommendations from the working groups. The Proposed Decision should be clarified to reflect this concept.

D. The Commission Should Clarify the Allocation of Informational Responsibilities Between CAB, the Certifying Agent, and Carriers.

At times, there appears to have been a lack of clarity regarding the types of customer questions that carriers should answer as opposed to inquiries that should be resolved by the

Commission's Consumer Affairs Branch ("CAB") or by the certifying agent. When the new certification and verification process was adopted, SureWest had understood that the certifying agent would largely be responsible for responding to customer inquiries about the program, and about customer eligibility. SureWest believes that carriers should provide general information about the program, information about the eligibility requirements in general, and information about the billing impacts of being a LifeLine customer. All other inquiries about the program should be handled by the certifying agent. Issues regarding appeals should be handled by CAB.

SureWest understands from customers that there have been some instances where customers are bounced back and forth between carriers and Solix and the Commission without receiving answers to their questions. Unless the information the customer is requesting is uniquely within the purview of the carrier, such as in the case of specific billing-related issues, Solix should be responsible for handling customer inquiries. Moreover, the Commission should further clarify the procedure for handling back-credits generated by successful appeals. SureWest had understood that CAB would direct Solix to send records to carriers where appeals have been successful, but this does not appear to be occurring in all cases. The Proposed Decision should clarify and formalize the allocation of informational responsibility amongst CAB, Solix, and the carriers.

## III. THE COMMISSION SHOULD FOCUS ITS ATTENTION ON SOME IMPORTANT LONG-TERM CHANGES TO THE LIFELINE PROGRAM.

While the reforms in the Proposed Decision should help to increase customer response rates and reduce the number of customer complaints, further changes are necessary. SureWest has been an active participant in the implementation and marketing "working groups" that were created in November 2006 to address the problems with the LifeLine program. Based on this participation, and based on SureWest's own experiences with LifeLine customers, SureWest has identified four key long-term program changes that will dramatically improve the program. These

areas should be the focus of the Commission's working group efforts in the months to come. Any short-term modifications adopted at this juncture must be viewed in the broader context of the Commission's long-term approach.

A. The Commission Must Ensure that the Certifying Agent Mails the Certification and Verification Documents to Customers in a Timely Manner via First-Class Mail.

By far, the most significant source of customer frustration under the LifeLine program has been that customers have not received their certification materials in a timely manner. SureWest began hearing about this problem from customers shortly after the program began, and the problem remains unresolved today. Before Solix took over the responsibility for sending the documents to customers, carriers were uniformly sending certification materials via first-class mail. First-class mail delivery is guaranteed, and it is typically delivered within two or three days anywhere in the United States. As evidenced in part by the 70% customer response rates that carriers achieved under the old certification system, first-class mail was a timely and reliable means of transmitting certification forms to customers.

When Solix began providing the certification materials to customers in July 2006, Solix used standard bulk mail. Standard mail delivery is not guaranteed, and can take considerably longer to get to recipients than first-class mail. Recent tests have confirmed that Solix-provided certification forms are taking approximately eight to 14 days to arrive. *See Staff Report*, at p. 18. In some cases, customers have reported not receiving the forms even after the certification due dates have passed. This is an unacceptable practice that SureWest believes is responsible for the bulk of the problems with the LifeLine program since its inception.

<sup>&</sup>lt;sup>1</sup> The "Staff Report" refers to the Report on Strategies to Improve the California Lifeline Certification and Verification Processes. This Staff Report appears as an attachment to the Proposed Decision.

Unfortunately, neither the Commission nor carriers became aware of this issue until the middle of January when the mailing issue was raised during an implementation working group conference call. Carriers were asking Solix about customer reports of significant delays in receiving certification documents during the 2006 holiday season. For the first time, Solix admitted that it had been using standard mail rather than first-class mail. The existing contract with Solix does not specify a mailing protocol. Since the Commission's first contract amendment with Solix had already been submitted to the Department of General Services by the end of December, it was too late to incorporate a change in the mailing protocols into the amendment. As a result, the use of standard mail persists today.

Although the proposed expansion of the time period for returning forms will help mitigate the impact of standard mail delays, it will not solve the problem. Customers will still be puzzled at not receiving certification documents in a timely manner. In many cases, getting certification documents to customers swiftly could make the difference between a customer following up to obtain a LifeLine discount, and letting the matter slip due to the press of other concerns.

Moreover, the expansion of the certification period may cause other customer hardships, since a customer may be back-billed for an additional month of LifeLine discounts if he or she is deemed ineligible.

The Commission should seek a further amendment to the Solix contract at the earliest possible opportunity to require that correspondence from Solix to customers be transmitted using first-class mail. Many of the proposals in the Proposed Decision are designed to mitigate the impact of customers' having not received certification documents in time to qualify for LifeLine discounts, but the Proposed Decision does not address the main source of the problem. Only by addressing the mailing issue will the Commission be able to provide all qualified customers with a full and fair opportunity to receive a discount.

## B. The Commission Should Reverse the Current Policy of Requiring LifeLine Discounts to be Provided Before the Certification Process is Complete.

Aside from correcting the mailing problem, the single most important reform that the Commission could adopt would be to discontinue the policy of providing LifeLine discounts to customers before their eligibility has been confirmed. In D.05-12-013, the Commission determined that customers should be given LifeLine discounts "at the point of the first consumer contact." D.05-12-013, *mimeo*, at p. 8. SureWest consistently opposed that outcome during the initial stages of this proceeding, largely based on a belief that a pre-qualification requirement was mandated by the FCC's *Lifeline / Linkup Order*, but also based on concerns that back-billing and bad debt issues would be exacerbated by giving discounts prior to confirmation of eligibility.

In light of the problems that have emerged during the first nine months of the program, the time has come to revise the Commission's approach to the timing of LifeLine discounts. The problems with the current policy are two-fold. First, since customers are given discounts before they complete the certification documents, the incentive to follow through with filling out and returning the form is significantly reduced. Despite the efforts of carriers and Solix to emphasize that the discounts are contingent upon complying with the certification procedures, granting an immediate discount conveys the impression that no further action is necessary. Consumers would be far more likely to promptly and diligently comply with the certification procedures if they had not yet received a discount.

The second and perhaps more significant problem with giving immediate LifeLine discounts under the current process is that the back-billing impacts on customers can be extreme. Under the current system, if a customer fails to return the certification form in a timely manner or fails to meet the program criteria, the customer will be back-billed for the discounted portion of

<sup>&</sup>lt;sup>2</sup> Lifeline and Link-Up Report and Order and Further Notice of Proposed Rulemaking, WC Docket No. 03-109, FCC 04-87 (rel. April 29, 2004).

two months of service, plus the discounted portion of any applicable connection or conversion fee. This amount can be between \$50 and \$150, a considerable sum for a low-income household that is truly qualified for LifeLine. If a customer reapplies and is again denied, the customer could be forced to pay another \$50 to \$150 in back-billed amounts. The back-billing impacts are particularly troubling in light of the untimeliness of the certification documents and the fact that many Lifeline-eligible customers are applying for discounts several times before successfully completing the process. As some consumer advocates observed during the March 8, 2007 "all party meeting" with Commissioner Grueneich, some customers cannot pay the unexpected back-billed amounts, so they are forced to drop their phone lines. Some of these customers will never come back on the system since they cannot pay their outstanding debt. This is an unfortunate outcome for low-income consumers, and it undermines the universal service goals of the LifeLine program.

To avoid this back-billing problem, and to enhance the incentives for customers to return certification documentation in a timely manner, the Commission should move to a prequalification regime. SureWest appreciates the Commission's inclusion of this proposal in the Staff Report, and SureWest urges the Commission to actively pursue this proposal as a long-term improvement to the LifeLine program. *See Staff Report*, at pp. 32-33. Under this proposal, new customers would be charged full tariffed rates upon service initiation, and then the carrier should issue back-credits to the customer if the customer is ultimately deemed eligible for LifeLine discounts. This pre-qualification procedure would remove any back-billing possibilities from the process, and would encourage the consumer to identify, fill out, and submit certification documentation in a timely manner. Customers would also have the option to wait until the certification process is complete to begin receiving telephone service. If an expeditious web-based

system can be developed to confirm customers' eligibility within a few days (or even hours), this would further enhance the attractiveness of a pre-qualification procedure.

# C. The Commission Should Pursue a Long-Term Marketing Strategy that Would Permit Customers to Obtain Certification Documents from a Variety of Sources.

To supplement the mailing solution and the pre-qualification proposal outlined above, the Commission should also investigate ways to broaden the channels through which customers can obtain certification documentation. The easier it is for customers to get certification forms in their hands, the more likely it will be that they can complete the certification process.

Under the current system, a customer can only receive a valid certification form through a single channel, and through compliance with a narrow set of procedures. The customer must call the carrier to request that he or she be placed on LifeLine service. This generates a data feed from the carrier to Solix, which generates a request from Solix to Solix's "fulfillment center." The fulfillment center then sends a certification form to the customer. Unless the consumer fills out and returns the exact, bar-coded form that was provided by Solix, Solix will not process the customer's application. If the customer misplaces the certification form, the only solution is to request another bar-coded form from Solix. Given the current timeframes for mailing these documents, it is unlikely that a replacement form would be received in time for the customer to return before the due date. Even with the expanded certification period outlined in the Proposed Decision, the ability of a customer to obtain and return a replacement form would be dubious.

Although it may take some time for Solix to adjust its procedures, and it may require some further modifications to Solix's contract, SureWest believes that the channels through which certification documents are available should be expanded. Certification documents should be made available on a website so that customers can fill out the forms immediately, and they can download replacement forms as necessary. It also may be productive to allow community-based

organizations to pass out certification forms to their constituencies. SureWest is not certain why the certifying agent can only process the bar-coded forms that are specific to each customer, but SureWest is confident that the implementation issues raised by this proposal could be addressed through the working groups.

## D. The Commission Should Encourage the Timely Development of a Web-Based Enrollment System.

The development of a web-based solution for enrolling customers will also help the Commission to maximize participation in the LifeLine program. In D.05-12-013, the Commission ordered that the certifying agent and the Commission should begin work on a web-based enrollment system within one year of the time when the certifying agent's contract is implemented. D.05-12-013, *mimeo*, at p. 59 (Findings of Fact 4-6). The web-based system must be implemented by one year after work on the project begins. Since Solix's contract was implemented on July 1, 2006, work on the web-based system must begin on July 1, 2007, and it must be completed by July 1, 2008. *Staff Report*, at p. 15.

SureWest supports the development of a web-based system as a way to streamline and expedite the certification process. As the Staff Report notes, other states have developed web-based mechanisms for enrolling customers in the program. *Staff Report*, at p. 60. A web-based system could be structured to facilitate instantaneous confirmation of program-based eligibility by cross-referencing customer information with data regarding other programs. Moreover, as discussed above, a web-based enrollment vehicle would complement a prequalification procedure. By starting early on developing a web-based system, the Commission and Solix can do the necessary testing to ensure that any database issues are resolved *before* the system is implemented.

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### IV. CONCLUSION.

SureWest appreciates the Commission's efforts to rectify the problems with the certification and verification processes under the LifeLine program, and SureWest values the opportunity to work collaboratively with all interested parties in this effort. In large part, the Proposed Decision is a step forward in addressing the issues with the LifeLine program.

SureWest urges the Commission to modify the Proposed Decision as set forth above, and to focus the parties' attention on the long-term issues facing the LifeLine program. Most importantly, the Commission should require the use of first-class mail for all mailings from Solix to customers. The Commission should also adopt a pre-qualification process to prevent substantial back-bills that can drive low-income customers off the system. In connection with these efforts, the Commission should broaden the channels for receiving LifeLine certification documentation and actively pursue a web-based enrollment process. With these long-term solutions in place, the Commission will be able to put forward the most effective certification and verification process possible within the strictures of the Lifeline / Linkup Order.

As the Commission continues this process, however, it should be noted that some of the customer ire and some portion of the cause for the low response rates is that fact that the FCC has placed an additional burden on customers seeking LifeLine discounts. Naturally, some customers who did not meet the proper income levels were nevertheless continuing to receive LifeLine discounts under the self-certification process in place prior to July 1, 2006. While the Commission should certainly undertake strong efforts to ensure that qualifying individuals receive LifeLine discounts, the Commission should also realize that some of the results of the new system are exactly as the FCC intended. The Commission's goals should not be to approximate the

1	program participation and response rates under the self-certification regime, but to make the new
2	program as effective and robust as it can be under the circumstances.
3	Respectfully submitted,
<b>4 5</b>	E. Garth Black Mark P. Schreiber
6	Sean P. Beatty Patrick M. Rosvall COOPER, WHITE & COOPER LLP 201 California Street, 17 <sup>th</sup> Floor
7 8	San Francisco, CA 94111 Telephone (415) 433-1900 Facsimile: (415) 433-5530
9	2 D. 7 - 10
10	By: Sean P. Beatty
11 12	email: sbeatty@cwclaw.com  Attorneys for
13	SureWest Telephone and SureWest TeleVideo
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### CERTIFICATE OF SERVICE BY MAIL

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I am a resident of the State of California, over the age of eighteen years, and not a party to the within action. My business address is COOPER, WHITE & COOPER LLP, 201 California

I, Noel Gieleghem, declare:

Street, 17<sup>th</sup> Floor, San Francisco, CA 94111.

On April 23, 2007, I served the following:

### OPENING COMMENTS OF SUREWEST TELEPHONE (U 1015 C) AND SUREWEST TELEVIDEO (U 6324 C)

**ON** 

PROPOSED DECISION OF ALJ JONES ADOPTING STRATEGIES TO IMPROVE THE CALIFORNIA LIFELINE CERTIFICATION AND VERIFICATION PROCESSES, AND **REINSTATING PORTIONS OF GENERAL ORDER 153** 

by placing a true and correct copy thereof with the firm's mailing room personnel for mailing in accordance with the firm's ordinary practices to the parties on the CPUC's service list for this proceeding. A true and correct copy was also e-mailed to parties who provided an e-mail address.

I declare under penalty of perjury that the foregoing is true and correct.

Executed on April 23, 2007 at San Francisco, California.



### **SERVICE LIST**

### CPUC Service List as of April 19, 2007 Proceeding No. R. 04-12-001

ANNA KAPETANAKOS ATTORNEY AT LAW AT&T CALIFORNIA 525 MARKET STREET, ROOM 2024 SAN FRANCISCO, CA 94105 ANGELA YOUNG
CALIF PUBLIC UTILITIES COMMISSION
FISCAL & ADMINISTRATIVE SERVICES
AREA 3-E
505 VAN NESS AVENUE
SAN FRANCISCO, CA 94102-3214

BETTINA CARDONA, PRESIDENT FONES4ALL CORPORATION 6320 CANOGA AVE, SUITE 650 WOODLAND HILLS, CA 91367

LINDA COOPER GLOBAL VALLEY NETWORKS, INC. 515 KEYSTONE BLVD. PATTERSON, CA 95363-8861 CHARLES E. BORN, MANAGER-STATE GOVERNMENT AFFAIRS FRONTIER, A CITIZENS TELECOMMUNICATIONS COMPANY PO BOX 340 ELK GROVE, CA 95759 CHERRIE CONNER
CALIF PUBLIC UTILITIES COMMISSION
PROGRAM MANAGEMENT &
IMPLEMENTATION BRANCH
AREA 3-D
505 VAN NESS AVENUE
SAN FRANCISCO, CA 94102-3214

CHRISTINE MAILLOUX, ATTORNEY AT LAW THE UTILITY REFORM NETWORK 711 VAN NESS AVENUE, SUITE 350 SAN FRANCISCO, CA 94102 LAW DEPARTMENT FILE ROOM
PACIFIC GAS AND ELECTRIC COMPANY
PO BOX 7442
SAN FRANCISCO, CA 94120-7442

DAN DOUGLAS
THE PONDEROSA TELEPHONE CO.
PO BOX 21
O'NEALS, CA 93645

DARCY BEAL, ASSOCIATE DIRECTOR AT&T CALIFORNIA 525 MARKET STREET, 19TH FLOOR, 21 SAN FRANCISCO, CA 94105-2727 DAVE CLARK
KERMAN TELEPHONE COMPANY
811 S MADERA AVE.
KERMAN, CA 93630

DALE DIXON, ATTORNEY AT LAW VYCERA COMMUNICATIONS, INC. 12750 HIGH BLUFF DRIVE, SUITE 200 SAN DIEGO, CA 92129

DONNA L. WAGONER
CALIF PUBLIC UTILITIES COMMISSION
UTILITY AUDIT, FINANCE
& COMPLIANCE BRANCH
AREA 3-C
505 VAN NESS AVENUE
SAN FRANCISCO, CA 94102-3214

DON EACHUS
VERIZON CALIFORNIA, INC.
CA501LB
112 S. LAKE LINDERO CANYON ROAD
THOUSAND OAKS, CA 91362

DOUGLAS GARRETT, VICE PRESIDENT, WESTERN REGION REGULATOR COX CALIFORNIA TELCOM, LLC DBA COX COMM 2200 POWELL STREET, SUITE 1035 EMERYVILLE, CA 94608-2618

EDWARD J SCHNEIDER, JR FORESTHILL TELEPHONE CO., INC. 4655 QUAIL LAKES DR. STOCKTON, CA 95207 ENRIQUE GALLARDO LATINO ISSUES FORUM 160 PINE STREET, SUITE 700 SAN FRANCISCO, CA 94111 ESTHER NORTHRUP COX CALIFORNIA TELCOM 5159 FEDERAL BLVD. SAN DIEGO, CA 92105

BRIAN PLACKIS CHENG BLUE CASA COMMUNICATIONS 911 OLIVE STREET SANTA BARBARA, CA 93101 GAIL LONG, TELEPHONE COMPANY HAPPY VALLEY/HORNITOS/WINTERHAVEN PO BOX 1566 OREGON, OR 97045 GLENNDA KOUNTZ REGULATORY ASSISTANT KERMAN TELEPHONE CO. 811 S. MADERA AVENUE KERMAN, CA 93630 GLENN STOVER ATTORNEY AT LAW STOVER LAW 221 MAIN STREET, SUITE 800 SAN FRANCISCO, CA 94105-1906

GRETA BANKS AT&T COMMUNICATIONS OF CALIFORNIA 525 MARKET STREET, 18TH FLOOR, 4 SAN FRANCISCO, CA 94105 HAZLYN FORTUNE
CALIF PUBLIC UTILITIES COMMISSION
ENERGY DIVISION
AREA 4-A
505 VAN NESS AVENUE
SAN FRANCISCO, CA 94102-3214

C. HONG WONG APEX TELECOM, INC. 113 10TH STREET OAKLAND, CA 94607

JACQUE LOPEZ, LEGAL ASSISTANT VERIZON CALIFORNIA INC CA501LB 112 LAKEVIEW CANYON ROAD THOUSAND OAKS, CA 91362 JOE CHICOINE, MANAGER, STATE GOVERNMENT AFFAIRS FRONTIER COMMUNICATIONS PO BOX 340 ELK GROVE, CA 95759

JOHN L. CLARK, ATTORNEY AT LAW GOODIN MACBRIDE SQUERI DAY & LAMPREY LLP 505 SANSOME STREET, SUITE 900 SAN FRANCISCO, CA 94111 JEFF COMPTON
VICE RESIDENT CARRIER RELATIONS
TELSCAPE COMMUNICATIONS INC.
606 EAST HUNTINGTON DRIVE
MONROVIA, CA 91016

JESUS G. ROMAN, ATTORNEY AT LAW VERIZON CALIFORNIA, INC. 112 S. LAKEVIEW CANYON ROAD, CA501LB THOUSAND OAKS, CA 91362

JESSICA T. HECHT
CALIF PUBLIC UTILITIES COMMISSION
DIVISION OF ADMINISTRATIVE LAW
JUDGES
ROOM 5113
505 VAN NESS AVENUE
SAN FRANCISCO, CA 94102-3214

JOHN A. GUTIERREZ COMCAST 12647 ALCOSTA BOULEVARD, SUITE 200 SAN RAMON, CA 94544 JOLEEN HOGAN CAL-ORE TELEPHONE COMPANY PO BOX 847 DORRIS, CA 96023

JEFF SCHNUR SOLIX INC. PO BOX 902 100 S. JEFFERSON ROAD WHIPPANY, NJ 7981 JAMES LOWERS THE SISKIYOU TELEPHONE COMPANY PO BOX 157 ETNA, CA 96027 JULIE WEIGAND RICHARD HEATH AND ASSOCIATES, INC. 590 W. LOCUST AVENUE, SUITE 103 FRESNO, CA 93650

JOY C. YAMAGATA
REGULATORY CASE MANAGER
SEMPRA UTILITIES
8330 CENTURY PARK COURT CP 32 D
SAN DIEGO, CA 92123

KAREN BAILEY
VERIZON WEST COAST
VERIZON CALIFORNIA, INC.
HQE01G69
600 HIDDEN RIDGE DR., E01E55
IRVING, TX 75038-2092

KAREN JONES
CALIF PUBLIC UTILITIES COMMISSION
DIVISION OF ADMINISTRATIVE
LAW JUDGES
ROOM 2106
505 VAN NESS AVENUE
SAN FRANCISCO, CA 94102-3214

KAREN A. DEGANNES
CALIF PUBLIC UTILITIES COMMISSION
ENERGY RESOURCES BRANCH
AREA 4-A
505 VAN NESS AVENUE
SAN FRANCISCO, CA 94102-3214

KIMBERLY KRETCHMER CITIZENS TELECOM COS OF CA/GS/TU 180 S. CLINTON AVENUE ROCHESTER, NY 14646-0400 KRISTIE FLIPPO TIME WARNER CONNECT 2805 DALLAS PKWY STE 140 PLANO, TX 75093-8720

LINDA LUPTON, REGULATORY MANAGER SUREWEST TELEPHONE PO BOX 969 ROSEVILLE, CA 95678 LATANYA LINZIE COX CALIFORNIA TELCOM, L.L.C. 2200 POWELL STREET, SUITE 1035 EMERYVILLE, CA 94608 W. LEE BIDDLE, ATTORNEY AT LAW FERRIS & BRITTON, P.C. 401 WEST A STREET, SUITE 1600 SAN DIEGO, CA 92101 LINDA BURTON PO BOX 219 OAKHURST, CA 93644

LORRIE BERNSTEIN MOSS ADAMS LLP

3121 WEST MARCH LANE, STE. 100

STOCKTON, CA 95219-2303

MARGARITA GUTIERREZ
DEPUTY CITY ATTORNEY
CITY AND COUNTY OF SAN FRANCISCO
1 DR. CARLTON B. GOODLETT PLACE, RM.
375
SAN FRANCISCO, CA 94102

NATALIE BILLINGSLEY
CALIF PUBLIC UTILITIES COMMISSION
TELECOMMUNICATIONS
& CONSUMER ISSUES BRANCH
ROOM 4108
505 VAN NESS AVENUE
SAN FRANCISCO, CA 94102-3214

PETER GLASS SEREN INNOVATIONS, INC. 15 SOUTH 5TH STREET, STE 500 MINNEAPOLIS, MN 55402

REGINA COSTA THE UTILITY REFORM NETWORK 711 VAN NESS AVENUE, SUITE 350 SAN FRANCISCO, CA 94102

ROBERT HAGA
CALIF PUBLIC UTILITIES COMMISSION
EXECUTIVE DIVISION
ROOM 5304
505 VAN NESS AVENUE
SAN FRANCISCO, CA 94102-3214

LYNNE MARTIN
PAC-WEST TELECOMM, INC.
1776 MARCH LANE, SUITE 250
STOCKTON, CA 95207

LOUIE DE CARLO, COMPLIANCE MANAGER MCI METRO ACCESS TRANSMISSION SERVICES 201 SPEAR STREET, 9TH FLOOR SAN FRANCISCO, CA 94105

MICHAEL SHAMES, ATTORNEY AT LAW UTILITY CONSUMERS' ACTION NETWORK 3100 FIFTH AVENUE, SUITE B SAN DIEGO, CA 92103

OLIVIA B. WEIN, ATTORNEY AT LAW NATIONAL CONSUMER LAW CENTER 1001 CONNECTICUT AVE., NW., STE. 510 WASHINGTON, DC 20036

MELISSA W. KASNITZ DISABILITY RIGHTS ADVOCATES 2001 CENTER STREET, THIRD FLOOR BERKELEY, CA 94704-1204

RISA HERNANDEZ
CALIF PUBLIC UTILITIES COMMISSION
ELECTRICITY RESOURCES
& PRICING BRANCH
ROOM 4209
505 VAN NESS AVENUE
SAN FRANCISCO, CA 94102-3214

SINDY J. YUN
CALIF PUBLIC UTILITIES COMMISSION
LEGAL DIVISION
ROOM 4300
505 VAN NESS AVENUE
SAN FRANCISCO, CA 94102-3214

LORRAINE A. KOCEN VERIZON CALIFORNIA INC. 112 S. LAKEVIEW CANYON ROAD THOUSAND OAKS, CA 91362

MARGARET L. TOBIAS ATTORNEY AT LAW TOBIAS LAW OFFICE 460 PENNSYLVANIA AVENUE SAN FRANCISCO, CA 94107

NELSONYA CAUSBY ATTORNEY AT LAW AT&T CALIFORNIA 525 MARKET ST., STE 2025 SAN FRANCISCO, CA 94105

PETER M. HAYES, DIRECTOR AT&T CALIFORNIA 525 MARKET STREET, ROOM 1919 SAN FRANCISCO, CA 94105-2727

ROSS A. BUNTROCK
WOMBLE CARLYLE SANDRIDGE
& RICE PLLC
1401 EYE STREET, N.W. SEVENTH FLOOR
WASHINGTON, DC 20005

ROBERT GNAIZDA
POLICY DIRECTOR/GENERAL COUNSEL
THE GREENLINING INSTITUTE
1918 UNIVERSITY AVENUE
SECOND FLOOR
BERKELEY, CA 94704

SEAN WILSON
CALIF PUBLIC UTILITIES COMMISSION
UTILITY AUDIT, FINANCE
& COMPLIANCE BRANCH
AREA 3-C
505 VAN NESS AVENUE
SAN FRANCISCO, CA 94102-3214

SHARON THOMAS
TECHNOLOGIES MANAGEMENT, INC.
210 N. PARK AVE.
WINTER PARK, FL 32789

SUZANNE TOLLER, ATTORNEY AT LAW DAVIS WRIGHT TREMAINE LLP 505 MONTGOMERY STREET, SUITE 800 SAN FRANCISCO, CA 94111-6533 THALIA N.C. GONZALEZ LEGAL COUNSEL THE GREENLINING INSTITUTE 1918 UNIVERSITY AVE., 2ND FLOOR BERKELEY, CA 94704

JOSIE WEBB
CALIF PUBLIC UTILITIES COMMISSION
ENERGY DIVISION
AREA 4-A
505 VAN NESS AVENUE
SAN FRANCISCO, CA 94102-3214

SEAN WILSON TALK.COM 12020 SUNRISE VALLEY, STE.250 RESTON, VA 20191

ERIN DAWLEY HORNITOS TELEPHONE COMPANY PO BOX 5158 MADISON, WI 53705-0158

KARL ANDREW REGULATORY AFFAIRS SAGE TELECOM, INC. 805 CENTRAL EXPRESSWAY SO, STE 100 ALLEN, TX 75013-2789 MICHAEL MORCOM VERIZON SELECT SERVICES, INC. 600 HIDDEN RIDGE, HQE01J016 IRVING, TX 75038 MARY PHARO VAR TEC TELECOM, INC. 1600 VICEROY DRIVE DALLAS, TX 75235

DAVID MORIARTY MEDIA ONE/AT&T BROADBAND 550 CONTINENTAL BLVD. EL SEGUNDO, CA 90245 THALIA R. GIETZEN

VYCERA COMMUNICATION, INC.
12750 HIGH BLUFF DR., STE.200

SAN DIEGO, CA 92130-2565

ERIC WOLFE, REGULATORY DUCOR TELEPHONE COMPANY PO BOX 42230 BAKERSFIELD, CA 93384-2230

JOSEPHINE WONG APEX TELECOM INC. PO BOX 1917 OAKLAND, CA 94604 LORRIE BERNSTEIN PINNACLES TELEPHONE COMPANY 340 LIVE OAK ROAD PAICINES, CA 95043-9998 YVONNE SMYTHE
CALAVERAS TELEPHONE COMPANY
PO BOX 37
COPPEROPOLIS, CA 95228

ROSE CULLEN
THE VOLCANO TELEPHONE COMPANY
PO BOX 1070
PINE GROVE, CA 95665-1070

ADRIENNE M. MERCER REGULATORY COMPLIANCE ANALYST SAGE TELECOM, INC. 805 CENTRAL EXPRESSWAY S, STE 100 ALLENT, TX 75013